SiteManager
Training Manual

Module A
Chapter 1

Contract Administration (+)
Contract Records (+)

Section A-1-1-c

Viewing Contracts

Student's Version

Indiana Department of Transportation
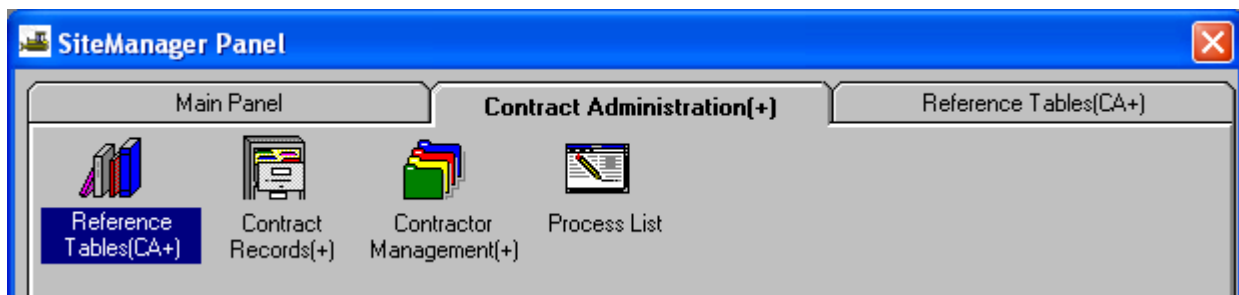December 2007, Version 3.7b

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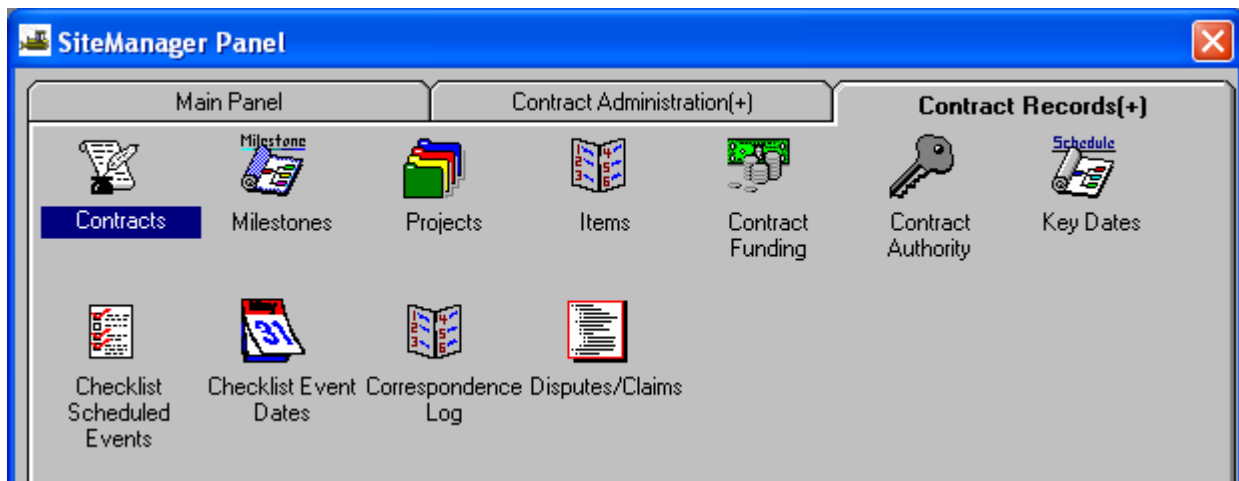
Viewing Contracts Information

The Contracts window is where the basic data for the contract is located.

"Double-click" on **Contract Administration (+)** located on the Main Panel.

"Double-click" on **Contract Records (+)**.

"Double-click" on **Contracts**.

There are eight tabs where information will be entered for Contracts:

Description: The **Description** tab displays the Contract description data.

Location: The **Location** tab shows the geographic location of the Contract

Payment Data: The **Payment Data** folder tab displays the Contract payment data that can be added, modified, or deleted.

Critical Dates: The **Critical Dates** folder tab lets the user view and record the occurrence of Critical Dates.

Primary Personnel: The **Primary Personnel** folder tab lets the user add, modify, and delete the Contract's primary personnel.

Prime Contractor: The Prime Contractor folder tab displays the Prime Contractor data.

DBE Commit: Not utilized by INDOT

Training Plan: Not utilized by INDOT

"Click" on the **Open** button located on the toolbar.

Note: If a contract has not been selected since the user logged into the SiteManager, then this step is skipped.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract. "Double-click" on the appropriate **Contract ID**.

Description Tab

Contract ID: **Contract ID** is the unique identifier for the contract..

Fed St/Pr Prj Nbr: **Fed St/Pr Prj Nbr** is the Federal and/or State project number.

Status: **Status** identifies the state of the contract.
- **Active**: users access to modify, view, or delete data of the contract in other windows.

- **Complete**: the contract is complete and locked.

- **Pending**: **Pending** status is the initial default setting for all contracts.

Primary PCN: **Primary PCN** is one of the PCN's on the contract. There is no relevance of importance of this PCN compared to the other PCN's on the contract.

District: **District** is district responsible for administrating the contract.

Area: will not be utilized by INDOT.

Progress Sched: Will not be utilized by INDOT.

Variance Pct: Will not be utilized by INDOT

Funding: Funding indicates that the contract is funded by Federal funds only, non-Federal funds only or both.

Desc: Desc field is a brief description of the contract.

Time Charges: Time charges are how contract time and progress is assessed during the life of the contract:
- Calendar Days
- Fixed Completion Date
- Work Days

Bid Days: **Bid days** is the original number of days for a contract when the time is charged by work days or calendar days.

Bid Amt: **Bid Amt** is the original bid amount of the contract.

Contract Type: **Contract Type** is the classification of the contract.

Work Type: **Work Type** is the classification of the major type of work being performed on the contract.

Fed Oversight: Federal Oversight indicates FHWA is included in the Change Order approval process.

Local Oversight: **Local Oversight** indicates the Local Public Agency is included in the SiteManager Change Order approval process

**Proposal Fund Type: Proposal Fund Type** is the type of funds used for the contract.

Spec Yr: Specification Year is the specification year of the items used for the contract.

Unit System: Unit System indicates that the measurement system used for the contract is either English or Metric.

Suppl Spec Bk Yr: Supplemental Specification Book Year is the supplemental specification year of the items used for the contract.

Alt ID: will not be utilized at this time

Wage Decision: Wage Decision is located in the Bottom Panel and will be automatically populated with a Default Wage Decision. Wage information will be found outside of SiteManager.
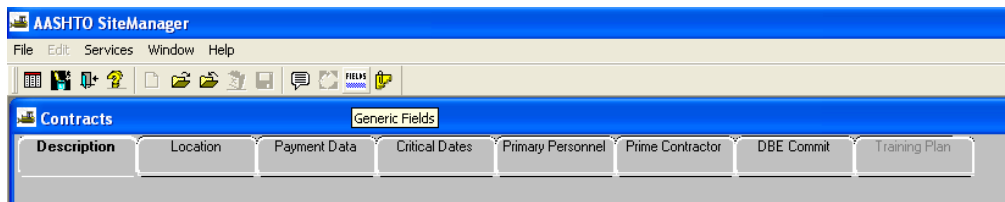
"Click" on the Generic Fields button located on the toolbar.
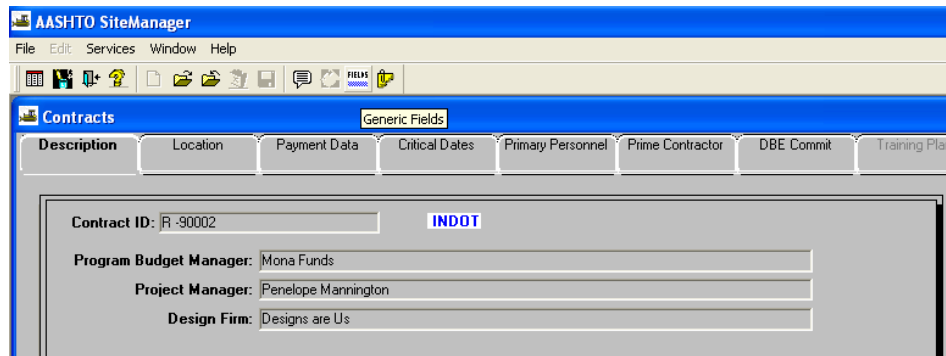
Program Budget Manager: The name of the Program Budget Manager assigned to the contract.

Project Manager: Project Manager is the name of the Project Manager for the Contract. Specific messages and reports are sent to this person by the system.

Design Firm: The Design Firm is the name of the firm that designed the contract.

Location Tab

The Location includes the list of available counties for INDOT and those associated with the selected Contract.

"Click" on the **Location** tab.

Top Panel
Contract ID: **Contract ID** is a unique identifier for the contract.

Location: **Location** is the geographic location of the physical work of the contract.

Beg Sta Nbr: Beginning Station Number is the beginning control station used during the life of the project.

Beg Termini: Beginning Termini is the beginning point of the contract.

Route Nbr: Route Number is the Federal or State Road identifier within the contract limits.

End Sta Nbr:. End Station Number is the ending control station used during the life of the project.

End Termini: Ending Termini is the ending point of the contract.

Highway Nbr: Highway Number is a unique identifier for the route.

Road System: Road System is the type of road and is automatically populated.

Highway Type: Highway Type is a more specific roadway definition and is automatically populated.

Town: Town is the nearest locality to the contract and is not utilized by INDOT

Bottom Panel

Contract County: Contract County is the county(ies)where the work is being performed.

Primary County: Primary County is assigned to one county when multiple counties are involved within the contract.

Payment Data Tab

The Payment Data folder tab displays the Contract payment data.

"Click" on the **Payment Data** tab.

Contract ID: **Contract ID** is a unique identifier for the contract.

Current Contract Amt: **Current Contract Am**oun**t** is the original dollar amount plus approved change orders dollar amount.

Generate Est1 Day: **Generate Est**imate **1 Day** is the date the first bi-monthly estimate is to be generated. This date is determined by the last number of the Contract ID. (ie Contract R -1234**5** would have the first estimate generated on the fifth day of the month).

Contract Limit Amt: **Contract Limit Amount** is not utilized by INDOT.

Liquidated Dam Rate Amt: Liquidated Damage Rate Amount is the dollar value assigned to the contract limit amount.

Generate Est2 Day: **Generate Estimate 2 Day** is the date the second bi-monthly estimate is to be generated. This date is determined by the last number the Contract ID plus fourteen days. (ie Contract R -12345 would have the second estimate generated on the nineteenth day of the month. [5 + 14days = 19th of the month]).

Contract Limit Pct: **Contract Limit Pct** is not utilized by INDOT.

Auto Liquidated Dam: The **Auto Liquidated Damages** field is not utilized by INDOT.

Price Adjmnt Ind: The **Price Adjustment Indicator** is not utilized by INDOT.

Securities Allowed: The **Securities Allowed** check-box is not utilized by INDOT.

Retain Stkpiled Ind: The **Retainage Stockpiled Indicator** is not utilized by INDOT.

Unlimited Escrow: The **Unlimited Escrow** checkbox is not utilized by INDOT.

Max Escrow Amt: The **Max Escrow Amt** field is not utilized by INDOT.

Retainage Changes Panel: The retainage information is captured in the The Retainage Changes Panel when retainage is on a contract.

Work Compl Basis: The **Work Compl Basis** indicates the method used for calculating Retainage. Selections include:
- Work Reported Per Period
- Work Remaining, or
- Work In Place

Effect Date: The **Effective Date** is the date the corresponding retainage percentage begins.

Pct: The **Percent** is the retainage percentage to be applied to the Contract.

Pct Base: The **Percent Base** indicates that retainage should be calculated as a percentage of the bid amount or the current amount

Max Pct: Max Percentage is not utilized by INDOT.

Max Amt: The **Max Amount** field is not utilized by INDOT.

Lump Amt: The **Lump Amt** field is not utilized by INDOT.

Trgr Pct: The **Trigger Percent** field is not utilized by INDOT.

Trgr Base: The **Trigger Base** field is not utilized by INDOT.

Critical Dates Tab

A critical date is a one time occurrence during the life of a contract.

"Click" on the **Critical Dates** tab.

Contract ID: **Contract ID** is a unique identifier for the contract.

Critical Date Description: - **Critical Dates Description** is the System-defined Critical Date type.

Actual Occurrence Date: Actual Occurrence Date is the date the event actually occurred. When an Actual Date is entered, the system notifies the selected recipient(s).

Rqrd to Activate: Required to Activate indicates that the event must occur before the Contract status can be changed from pending to active.

Rqrd to Finalize: **Required to Finalize** indicates that the event must occur before the Contract status can be changed to complete.

Distribution List: Distribution List is not utilized by INDOT.

Recipient ID: Recipient ID is the User ID of the person to be notified that the event has occurred.

Message Text: Message Text is the Standard message to be sent to the recipient(s).

Definitions of Critical Dates:
1. **Accepted Date: Accepted Date** is not utilized by INDOT.

2. **Adjusted Completion Date: Adjusted Completion Date** is calculated by an authorized change order..

3. **Award Date: Award Date** is the date that the contract has been awarded to the contractor.

4. **Checked Out to Field Date:** The Checked Out to Field Date is not utilized by INDOT

5. **Contract Archived Date:** The **Contract Archived Date** is entered by the Contract archival process.

6. **Contractor Bankruptcy Date: Contractor Bankruptcy Date** is the date the contractor's date of bankruptcy.

7. **Contractor Default Date: Contractor Default Date** is the date the prime contractor defaults on the contract.

8. **Final Acceptance Date: Final Release Date** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Final Release date for the contract.

9. **Execution Date: Execution Date** is the same as the **Award Date**.

10. **Letting Date: Letting Date** is a date that the contract bids are opened.

11. **Notice to Proceed Date: Notice to Proceed Date** is a written notice to the contractor to proceed with the contract work.

12. **Open to Unrestricted Traffic Date: Open to Unrestricted Traffic Date** is not utilized by INDOT.

13. **Original Completion Date: Original Completion Date** is the date that the contract is to be completed as per the awarded contract.

14. **Physical Work Complete Date: Physical Work Complete Date** Before entering this date, all Change Orders must be approved or denied. When this date is entered, the system notifies personnel and enters final quantities for active Items and moves all active items to final status. Once this date has been entered and saved, the user will no longer be able to post DWRs on items moved to the Final status.

15. **Price Adjustments Base Date: Price Adjustments Base Date** is not utilized by INDOT.

16. **Signed Date: Signed Date** is not utilized by INDOT.

17. **Substantial Completion Date; Substantial Completion Date** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Substantial Completion date for the contract.

18. **First Day of Work Date: First Day of Work Date** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the First Day of Work date for the contract.

19. **Assign to FieldManager Date: Assign to FieldManager Date** is not utilized by INDOT.

Primary Personnel Tab

The Primary Personnel folder tab contains contract personnel information. Every Contract must have a Project Manager and a Project Engineer. When an authorized user adds the Project Manager and Project Engineer to the Contract, SiteManager adds them automatically to Contract Authority. If primary personnel are later replaced, SiteManager starts authority for the new personnel and ends authority for the previous personnel.

"Click" on the **Primary Personnel** tab.

Contract ID: **Contract ID** is a unique identifier for the contract and is automatically populated.

PE/S: Project Engineer/Supervisor assigned to the contract.

Area Engineer: The **Area Engineer** is the name of the Area Engineer assigned to the contract.

Contract Designer: Contract Designer is the name of the person or firm that designed the Contract.

Contract Created By: Contract Created By is the name of the user who added the Contract or a system indicator for Contracts built by the system.

Contract Status is Changed to Active: Notification is sent to the Area Engineer when the contract is activated.

Distribution List: Distribution List is not utilized by INDOT.

Work Progress Behind Schedule is not utilized by INDOT.

Civil Rights Exception Report Generated is not utilized by INDOT.

Prime Contractor Tab

The Prime Contractor folder tab displays the Prime Contractor data.

"Click" on the **Prime Contractor** tab.

Contract ID: Contract ID is a unique identifier for the contract.

Current Prime: - Current Prime is the Vendor ID and short name for the current Prime Contractor.

Defaulted Original Prime Contractor: Defaulted Original Prime Contractor is t
Vendor ID and short name for the original Prime Contractor who was awarded the
Contract and then defaulted.

Joint Venture: Joint Venture indicates that the Contract was awarded to a joint
venture.

DBE Commit Tab is not utilized by INDOT.

Training Plan tab is not utilized by INDOT.

Viewing the Contracts Window

A -1-1-c
Group Exercise

The PE/S needs to be contacted about Contract R -90003.
Review the Contracts window to determine the PE/S for the contract.

Log into SiteManager   inquire
Enter Password   pass

Navigate from the **Main Panel**
"Double-click" **Contract Administration (+)** icon.
"Double-click" **Contract Records (+)** icon.
"Double-click" **Contract** icon.

Click the Open button.
Select   Contract ID: R -90001

Click the Primary Personnel tab.

Who is the PE/S?

Click the Close button.